

BUDGET BULLETIN

September 2024



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We Want to Hear from You! Deadline Extended to 9/16: Annual Budget Survey

**WE WANT TO
HEAR FROM YOU!**

We have had a lower-than-desired response to the Annual Budget Survey. This is our opportunity to hear from you about how the FY 2025 budget process went. We use information from the survey to try to improve next year's budget process. Information from the survey is also shared with Elected Leaders and Department Directors to help improve internal processes. You have great ideas but we can't consider them if you don't tell us about them.

If you've already filled it out, thank you! If you haven't had a chance yet, we have extended the deadline to Monday, 9/16.

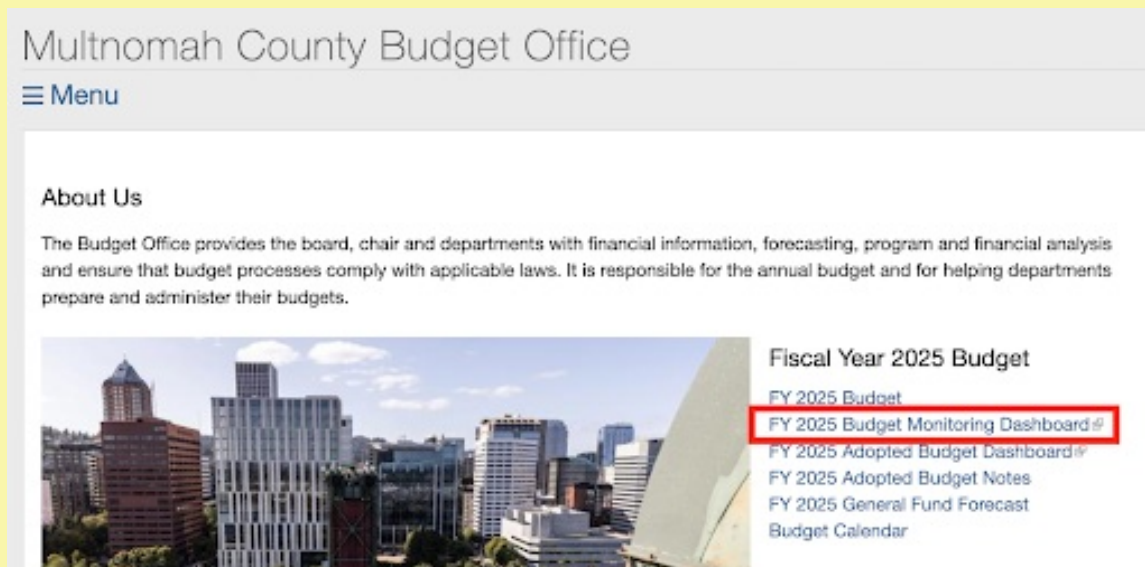
FY 2025 Budget Monitoring Dashboard Now Available



The public-facing [FY 2025 Budget Monitoring Dashboard](#) is now available. The dashboard provides an easily understood graphical representation of current budget spending by department, fund, and major expense category (e.g. personnel, contractual services,

etc.). And, **new for FY 2025, the dashboard shows Program Offers!** It also includes department historical spending information. The data will be refreshed monthly.

You can find a link to the dashboard on the [Budget Office home page](#).



There is also an [internal \(staff only\) version of the dashboard](#) that contains more detailed information and projection models. Department executives and finance staff have access to the internal version. You can email your Central Budget Office Analyst for additional user access.

FY 2025 Spending Reports



Because the Budget Monitoring Dashboard alone cannot provide all necessary context, the Budget Office is developing a process to provide two spending reports to the Board of County Commissioners: a mid year and year end report. These reports will ensure the Board and community are provided with adequate explanations of substantive differences between budget and actuals, and will include summaries of budget modifications.

FY 2025 Cost Objects with Actuals, but no Budget

One more detail about the FY 2025 Budget Monitoring Dashboard that may interest you: There are quite a few cost objects with actuals in Workday that are not in the FY 2025



Adopted budget. The Budget Office used those cost objects' responsible cost centers in Workday to determine the appropriate Program Offer to tie them to in the dashboard, working with department Business Managers for confirmation (or exceptions). However, there were a few cost objects where the responsible cost center is not tied to a specific program offer. This prevented the Budget Office from accurately assigning these expenses. The Budget Office worked with Business Managers to resolve these issues. Also, we expect additional cost objects without budgets to show up in future fiscal periods, which will need Business Manager input. If you have questions about this, please check with your department Business Manager.

Updates to Budget Modification Manual



Budget modifications are the method by which the budget is changed after adoption. There are two kinds of budget modifications (budmods): (1) formal budmods, which require Board approval, and (2) internal budmods, which are approved by the Central Budget Office and do not need Board approval.

The Budget Modification Manual, found [on our website](#), provides detailed information about these two types of budget modifications and the process for creating them and getting them approved.

The Budget Office has updated the Budget Modification Manual to clarify that programmatic or policy changes need to be made through formal budget modifications so the Board and public can see the changes.

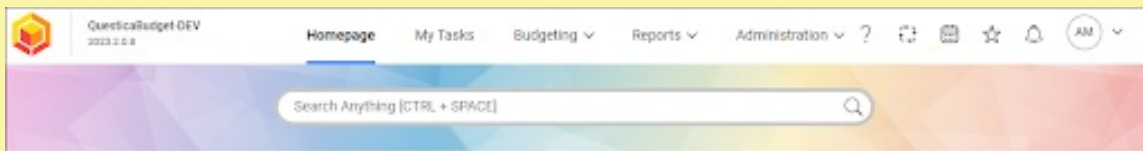
- Includes reorganizations, such as moving budget from one division or program offer to another.
- Includes net \$0 changes.
- Consent vs Regular agenda will be determined on a case-by-case basis until we have a better understanding of what types of budmods come through.
- Internal budmods are only for technical accounting corrections.

Questica Upgrade



The Budget Office is working to upgrade Questica, which will be released to departments in October. The main change is an upgraded user interface, so everything has a new look. The menu items are now on the top of the screen instead of on the left.

The process of preparing a budget and request forms will not be changing. We are creating new Quick Reference Guides (QRGs) and training videos based on the new look. We'll also have live training opportunities to go over the changes.



In conjunction with the upgrade, we're taking this opportunity to rename some items in Questica to match Workday and the Financial Datamart Project:

- Major Department becomes Department
- Department becomes Sub Department (this is the same as department, but Nondepartmental is broken out into its various offices)
- 4 Digit Fund becomes Fund Hierarchy
- 5 Digit Fund becomes Fund
- Responsible Cost Center becomes Related Cost Center
- Spend/Revenue Category becomes Ledger Account Detail (because it is unrelated the Spend and Revenue Categories in Workday)
- JCN becomes Job Profile

This [short video](#) introduces you to the new look and feel of the Questica upgrade.

New Staff



Please welcome Jenna Bryant (she/her), who joined the Budget Office in August as a Hatfield Fellow from Portland State University. Jenna recently received her Master's degree in Public Administration

from the University of Oregon, where she focused on community development and disaster recovery. Jenna will be taking the lead in researching a report that weighs the possibilities and risks of a biennial budget process, as compared to our current annual budget process, in response to a [recommendation](#) from the Multnomah County Auditor's Office. Jenna will also be looking into how the County could enhance public engagement in the budget process and with budget information. In her spare time, she enjoys reading, sewing, and exploring the great outdoors.

On September 16th, you'll also be able to welcome Evan Kersten (he/him), our newest Senior Budget Analyst in the Central Budget Office. Most recently, Evan spent several years leading data strategy at Citizenly, an online data platform designed to help government officials, candidates, and members of the public. He has a Master of Public Administration and a Public Policy Graduate Certificate from Tennessee State University, and has spent time consulting with special district associations, working on university enrollment strategies and initiatives, and serving in public policy analysis and government relations roles. Evan is deeply committed to telling stories with data. When not at work, he is either hiking with his camera, kayaking, or sitting at a favorite cafe. Stay tuned for staffing/assignment updates in the Budget Office once Evan gets settled in.

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